



## OUR REVIEWS:

The Sense Financial Team has been extremely helpful taking confusing situations and making them very simple. I have recommended 5-6 of my friends and family and will continue to do so!

- Tim M.

Sense Financial is the BEST! The team is extremely helpful and responsive. They explain things clearly and have a Knowledge Base that provides a wealth of information. All communications are professional and timely. I can't imagine using anyone else for

- Julie K.

## OUR SERVICES INCLUDE:

- Establishment of (1) one Special Purpose LLC
- All state, legal and filing fees are included in the establishment fee
- Preparation & filing of Articles of Organization
- Preliminary name search
- Preparation of EIN filing and acquisition of an EIN number
- Obtaining a Certificate of Organization from the Secretary of State
- Assistance in the establishment of an IRA LLC business bank account
- And much more!

## GET IN TOUCH



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www.sensefinancial.com



## SENSE FINANCIAL

Checkbook IRA

A Retirement Solution  
That Puts You in Control

# CHECKBOOK IRA: A POWERFUL TOOL FOR BUILDING WEALTH

Since the early 2,000s, the number of self-directed IRAs has more than doubled! These plans give individuals the ability to invest in assets that they understand and can control, such as real estate. Investors who have knowledge and expertise in a particular investment asset can purchase them in a tax-free or tax-deferred environment.

Self-directed IRAs are qualified retirement plans in which the account holder is the sole investment decision maker. According to IRS regulations, a qualified custodian (bank or trust company) holds the assets of an IRA on behalf of the account holder. The IRA custodian maintains the assets and all transaction records of the account, issues periodic statements, files required IRS reports, and performs other administrative duties on behalf of the account holder.

**Call us TODAY for  
a Free Consultation!**

**(949) 228-9394**

## THE CHECKBOOK IRA: HOW DOES IT HELP YOU?

A Checkbook IRA (also known as an IRA-owned LLC or IRA LLC) is a cost-effective and time-efficient investment vehicle available to self-directed IRA investors. This investment vehicle is a popular choice for gaining “checkbook control” of an IRA. Here’s how the process goes:



Open a self-directed account with an IRS-approved custodian.



Roll over funds from your existing IRA or 401k plan.



A special purpose LLC is created, which is owned by the IRA. You will act as the manager of this LLC.



You direct the custodian to purchase 100% of the LLC units. The LLC is then funded and ready for investments.

## Checkbook IRA Benefits

The Checkbook IRA (also known as a self-directed IRA LLC) from Sense Financial Services offers powerful advantages to its participants. It’s the perfect solution for investors who wish to diversify their retirement savings. The Checkbook IRAs advantages include:

- ▶ Checkbook Control
- ▶ Direct Access to Funds
- ▶ Tax Deferrals
- ▶ Cost Effective
- ▶ Unlimited Investment Options

## Investment Options

- ▶ Real Estate
- ▶ Precious Metals
- ▶ Tax Liens
- ▶ Tax Deeds
- ▶ Private Businesses
- ▶ And more!